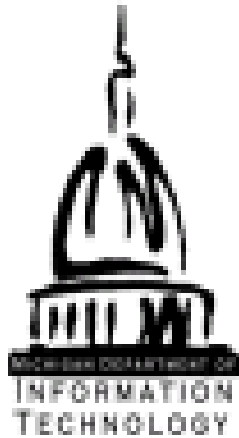


# **Dashboard Reporting User Guide**



Michigan Department of Information Technology  
Strategic Project Office

November 2003

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## Introduction

The Department of Information Technology (DIT), Strategic Project Office (SPO) has developed a monthly reporting process called the “Dashboard” to monitor Enterprise Top IT Projects. The Dashboard is a compilation of key information for presentation to the DIT Leadership Team, providing a succinct monthly summary of the status of the State’s major information technology projects currently under way.

The Dashboard establishes a common reporting mechanism for Project Managers, Business Sponsors and the DIT Leadership Team to periodically view the status of projects and monitor progress against key indicators. The Dashboard provides decision makers with an analysis tool and communication vehicle for proactive planning and risk mitigation.

Please send all questions/comments regarding the Dashboard to [DIT-ProjectManagement@michigan.gov](mailto:DIT-ProjectManagement@michigan.gov).

## Purpose of this Users Guide

This guide was created to provide the Project Manager with the necessary information and procedures to complete the monthly “Enterprise Top IT Project Status” document (Status Report), and to understand the importance of their input into the dashboard reporting process.

This guide will also give guidance to the Business Sponsor and the DIT Leadership Team on how Dashboard data is collected and reported – as well as their role in this process.

An Adobe Acrobat version of this user guide can be found on the DIT Project Management Support Services website in the Project Management Tools area at [www.michigan.gov/projectmanagement](http://www.michigan.gov/projectmanagement).

## Dashboard Roles

The Dashboard incorporates a multilevel status report creation and approval process. Seven roles are defined for Dashboard users (see the Process Flow Diagram on page 6):

- **Project Manager**
  - **Description:** Individual appointed and given responsibility for management of the project.
  - **Dashboard Role:** Creates monthly Status Reports, Communicates with Business Sponsor and DIT Leadership Owner on project status.
- **Business Sponsor**
  - **Description:** The key individual who approves funding for the project. Traditionally referred to as the Project Sponsor, but may be the Agency Director for a major project.
  - **Dashboard Role:** Evaluates and Approves Status Reports, Communicates with Project Manager and DIT Leadership Owner on project status.
- **DIT Leadership Owner**
  - **Description:** The DIT Leadership Owner is the individual that oversees the area conducting the project.
  - **Dashboard Role:** Evaluates and Approves Status Reports, Communicates with Project Manager and Business Sponsor on project status.

- **Portfolio Liaison**
  - **Dashboard Role:** Gathers monthly Project Status Reports from individual Project Managers. Sends Project Status Reports to SPO for roll-up reporting.
  - **Additional Roles:** Gathers additional project and application related information, as needed. Mentors Project Managers on Troubled Projects.
- **Strategic Project Office**
  - **Dashboard Role:** Compiles monthly Dashboard Report from individual Project Status Reports.
  - **Additional Roles:** Presents Dashboard Report to DIT Leadership Team. Assists other Roles in Dashboard activities. Maintains the active list of Enterprise Top IT Projects. Mentors Project Managers on Troubled Projects. Offers advice to the DIT Leadership Team Regarding Troubled Projects.
- **DIT Leadership Team**
  - **Dashboard Role:** Reviews Enterprise Top IT Projects monthly, Comments on Status Reports, Makes Recommendations on Corrective Actions to Project Manager, Business Sponsor, and/or DIT Leadership Owner as needed. Ensures the Dashboard is properly administered.
- **DIT Executive Team**
  - **Dashboard Role:** Ensures that projects that are not healthy get access to the appropriate level of resources, including funding and staff.

## Enterprise Top IT Project Definition

The Department of Information Technology has defined the following criteria for an Enterprise Top IT Project:

- **Has enterprise significance; or**
- **Exceeds five million dollars in total estimated project cost and deemed mission critical.**

A project has **Enterprise Significance** if it:

- **Is strategic to the enterprise;**
- **Involves multiple agencies;**
- **Has opportunities for significant cost savings; or**
- **Is mandated and has large penalties for non-compliance.**

## Adding To and Removing Projects From The List

The Strategic Project Office will send an email reminder to the DIT Leadership Team on a monthly basis, asking for any new additions to the Enterprise Top IT Projects list. DIT Leadership Team members will notify the SPO of any new additions by including the project name, key client agency, and Project Manager name or by including a completed “Enterprise Top IT Project Status” report – in an email to SPO. This notification should be sent to the following email address: DIT-ProjectManagement@michigan.gov.

In the event that the Strategic Project Office becomes aware of a potential Enterprise Top IT Project, an email will be sent to the applicable DIT Leadership Owner asking whether the project should be added to the list.

Projects will be removed from the Enterprise Top IT Projects list when the project is completed or has been put on long-term hold due to lack of funding or other reasons. The DIT Leadership Owner shall notify SPO when a project is to be removed from the list.

In the event that the Strategic Project Office becomes aware of a Enterprise Top IT Project that may have been put on hold, an email will be sent to the applicable DIT Leadership Owner asking whether the project should be removed to the list.

## **Dashboard Reporting Process Flow**

### **Monthly Status Reporting Cycle (as shown on page 6):**

- By the 5th business Day:** The Project Manager completes the “Enterprise Top IT Project Status” report based on the previous month’s activity and forwards it to both the Business Sponsor and the DIT Leadership Owner via email.
- By the 8th business Day:** The Project Manager, Business Sponsor and DIT Leadership Owner meet to discuss the status report. (It is assumed that this team is meeting on a regular basis during the month. The report is a formal communication tool.)
- By the 10th business Day:** The Portfolio Liaison forwards the reports to Strategic Project Office via email (DIT-ProjectManagement@michigan.gov).
- By the 12th business Day:** Strategic Project Office creates the “Enterprise Top IT Project Dashboard” report based on data received, and delivers to the DIT Leadership Team, the Portfolio Liaisons, and the Project managers.
- By the 15th business Day:** Strategic Project Office delivers the “Enterprise Top IT Project Dashboard” to the DIT Executive Team.

# Process Flow Diagram

## Project Manager

Start of the month



Assigns Key Indicator Scores Based on Project Data and Prepares Enterprise Top IT Status Report by the 5<sup>th</sup> Business Day

## Business Sponsor

Discusses any Issues with Project Manager and DIT Leadership Owner



## DIT Leadership Owner

Discusses any Issues with Project Manager and Business Sponsor



Project Manager, Business Sponsor, and DIT Leadership Owner meet to discuss Project Status Report by the 8<sup>th</sup> Business Day

Project Manager forwards report via email by the 10<sup>th</sup> Business Day

## Portfolio Liaison



Works with Project Managers and Strategic Project Office to gather project-related information

Portfolio Liaison forwards reports to Strategic Project Office

## Strategic Project Office



Compiles Dashboard Report. Mentors Project Managers and offers suggestions to DIT Leadership and Executive Teams regarding troubled projects

Dashboard Report transmitted by the 12<sup>th</sup> Business Day via email

## DIT Leadership Team



Reviews Dashboard Report. Offers assistance to troubled projects

Dashboard Report transmitted by the 15<sup>th</sup> Business Day via email

## DIT Executive Team



# Enterprise Top IT Project Dashboard Report

## Overview

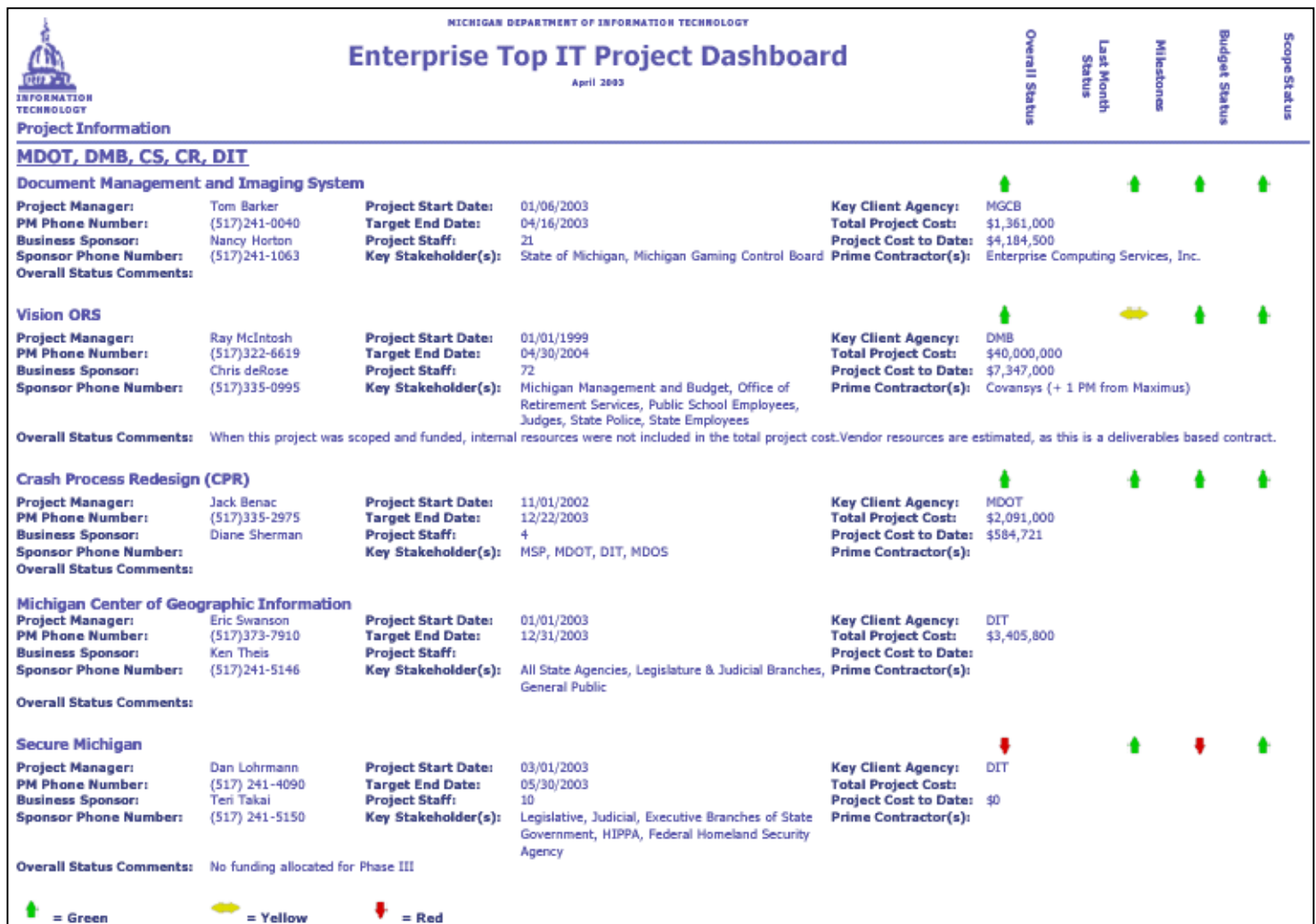
The following is a sample of the Enterprise Top IT Project Dashboard Report that is prepared monthly for the DIT Leadership Team by Strategic Project Office.

The Dashboard provides a visual status of the project's health through the use of the green, yellow and red symbols for key project indicators. A synopsis of each project is included to provide the DIT Leadership Team with milestones, budgetary and financial data as well as key project contact information.

The Dashboard will be organized, as follows:

- FIA & DCH Projects
- MDOT, DMB, DCS, DIT, & Civil Rights Projects
- MSP, DOC, Military Affairs, & AG Projects
- Treasury & DOS Projects
- HAL, DEQ, DNR, & MDA Projects
- CIS, MDE, & Career Development Projects
- Enterprise Application Projects
- Center for Geographic Information Projects

## Sample Report



## **Monthly Report of Enterprise Top IT Project Status**

This document is to be completed by the Project Manager, in cooperation with the Business Sponsor and the DIT Leadership Owner. This document is to be completed by the 5<sup>th</sup> business day of the month for the duration of the project's life. In the event that this project is put on an extended hold, due to funding or another cause, the DIT Leadership Owner will inform the Project Manager that the Status Report is not needed. Once the project begins expending resources again, the normal reporting cycle will resume.

A copy of the "Enterprise Top IT Project Status" template can be found on the following page. Instructions for completing the Enterprise Top IT Project Status report follow the template, beginning on page 11 of this user guide.

A soft copy of the Enterprise Top IT Project Status template can be found on the DIT Project Management Support Services website in the Project Management Tools area at [www.michigan.gov/projectmanagement](http://www.michigan.gov/projectmanagement).

## Michigan Department of Information Technology

### Enterprise Top IT Project Status

Project Name		Key Client Agency	Report Date
Existing System Name (if applicable)		DIT Leadership Owner	
Project Manager	Phone	Email	
Key Business Sponsor	Phone	Email	
Project Overview (description, purpose, agencies & other key stakeholders involved)			

#### Key Benefits

- |   |   |
|---|---|
| <input type="checkbox"/> Migration away from mainframe or obsolete technology<br><input type="checkbox"/> Cost Reduction<br><input type="checkbox"/> Application and Data Interoperability<br><input type="checkbox"/> Increased Security and Privacy | <input type="checkbox"/> Web-Based application, service or solution<br><input type="checkbox"/> Additional State Revenue Collection<br><input type="checkbox"/> Customer Service Improvement<br><input type="checkbox"/> Legislatively Mandated Project or Initiative |
|---|---|

#### Key Project Stakeholders

#### Target Audience of Resulting Product

Project Start Date				Target End Date			
Total Project Cost	Internal Funding Type	Internal Funding Amount	External Funding Type	External Funding Amount			
Internal Project Staff Count				External Project Staff Count			
Prime Contractor(s)							

#### Overall Project Score

(Insert Current Overall Project Score in the next available cell from the left)

mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy	mm/yy
Green	Green	Green	Yellow	Yellow	Red	Yellow	Green	Green			
Overall Project Score				Overall Project Score Comments							
<input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red											

Milestone Score		
Major Project Milestone	Target End Date	Status

Milestone Score	Milestone Score Comments
<input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red	

Budget Score	
Actual Project-To-Date Cost	Total Remaining Project Cost

Budget Score	Budget Score Comments
<input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red	

Scope Score	
Were there changes to the project scope this period?	If yes, to what extent did this change affect project cost, schedule, or project deliverables?

Scope Score	Scope Score Comments
<input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red	

Other Project Related Comments:

## Instructions for Preparation

1. **Project Name:** The name that has been designated for the project.
2. **Key Client Agency:** The name of the principal agency that will benefit from the product of the project. Normally, this is the agency where the key Business Sponsor resides. Additional agencies involved in the project can be noted in the Project Overview (item 12 below). Choose the agency designation from the following list:

Agriculture – <b>MDA</b>	Gaming Control Board – <b>MGCB</b>
Attorney General – <b>AG</b>	History, Arts & Libraries – <b>HAL</b>
Career Development – <b>MDCD</b>	Information Technology – <b>DIT</b>
Career Education Performance & Information – <b>CEPI</b>	Lottery – <b>Lottery</b>
Center for Geographic Information – <b>CGI</b>	Management – <b>DMB</b>
Civil Rights – <b>MDCR</b>	Military and Veterans Affairs – <b>DMVA</b>
Civil Service – <b>MDCS</b>	Natural Resources – <b>DNR</b>
Community Health – <b>MDCH</b>	Secretary of State – <b>SOS</b>
Consumer & Industry Services – <b>CIS</b>	State Budget – <b>Budget</b>
Corrections – <b>Corrections</b>	State Employer – <b>OSE</b>
Education – <b>MDE</b>	State Police – <b>MSP</b>
Enterprise Applications – <b>EA</b>	Transportation – <b>MDOT</b>
Environmental Quality – <b>DEQ</b>	Treasury – <b>Treasury</b>
Family Independence Agency – <b>FIA</b>	
3. **Report Date:** The month and year currently being reported. Example “June 02”
4. **Existing System Name (if applicable):** Enter the commonly accepted application system name that is being enhanced.
5. **DIT Leadership Owner:** Enter the DIT Leadership Team member that oversees this project area.
6. **Project Manager:** The name of the person who is responsible for the day-to-day management and delivery of the project.
7. **Phone:** The work phone number of the Project Manager.
8. **Email:** The email address for the Project Manager.
9. **Key Business Sponsor:** The name of the person who has been identified as the project sponsor from the business area. If there is more than one Business Sponsor, identify one person as the “key” project sponsor.
10. **Phone:** The work phone number of the key Business Sponsor.
11. **Email:** The email address of the key Business Sponsor.
12. **Project Overview:** A concise description of the project, purpose, and the identity of all agencies and/or other stakeholders that will be involved. This overview should be limited to 100 words or less.
13. **Key Benefits:** Identification of any tangible or intangible benefits that will be received by the customer from this project and /or any revenue or efficiency the State of Michigan will gain as a result of the product being developed. Check all that apply.
14. **Key Project Stakeholders:** Identify the key stakeholders for this project. These are the individuals or business areas affected by the project or the resulting product/service.
15. **Target Audience of Resulting Product:** Identification of the intended audience that will benefit from implementation of the product/service that results from this project.
16. **Project Start Date:** The actual date the project was initiated. Format: mm/dd/yyyy
17. **Target End Date:** The date that has been targeted for completion of the project. Format: mm/dd/yyyy

18. **Total Project Cost:** Includes all human resource cost, state IT staff and business (program) staff, non-state staff, as well as all hardware, software, network and facilities. Excludes maintenance, operational and monitoring costs.
19. **Internal Funding Type:** Choices include: General, Restricted, Federal, Other, or a mixture. Please include funding match information, such as “50/50 Restricted/Federal” and/or Restricted funding source, such as “State Restricted Transportation Funds.”
20. **Internal Funding Amount:** Enter the total project amount for internal funding. Internal funding includes those costs for state employee project staff. Format: \$999,999,999
21. **External Funding Type:** Choices include: General, Restricted, Federal, Other, or a mixture. Please include funding match information, such as “50/50 Restricted/Federal” and/or Restricted funding source, such as “State Restricted Transportation Funds.”
22. **External Funding Amount:** Enter the total project amount for external funding. External funding includes those costs for contractors, equipment, and materials. Format: \$999,999,999
23. **Internal Project Staff Count:** Identify the current state employee project staff count, both IT and business. Individuals on the team that are devoted less than 100% on this effort should also be counted. This is not to be interpreted as full-time equivalents on the project, but as the **total number of state staff that are actively contributing to the completion of the project**.
24. **External Project Staff Count:** Identify the current contractor (and other non-state staff) project staff count. Individuals on the team that are devoted less than 100% on this effort should also be counted. This is not to be interpreted as full-time equivalents on the project, but as the **total number of non-state staff that are actively contributing to the completion of the project**.
25. **Prime Contractor(s):** Identify the names of the key contractor(s) that are participating in the implementation of this project. Identify which one is the prime contractor, if more than one is listed.

The remainder of this section discusses the areas of the Monthly Report of Enterprise Top IT Project Status that pertain to key project indicators, using variance analysis and other means to determine those indicators.

## Project Variance Analysis

Any project, in a simplistic manner, can be measured by deliverables in terms of **milestones**, **budget**, and **scope** and can be monitored via variance analysis. All Project Managers conduct variance analysis when assessing their projects to ensure that deliverables are being completed to meet milestones, have enough resources, to maintain schedule, and to monitor the money. (A more advanced way of assessing projects is called Earned Value Analysis.)

Variances can be positive (e.g. the project is ahead of schedule) or negative (e.g. the project is over budget). Variances are derived (calculated) by measuring *actual* deliverables, budget, schedule, and hours, at a certain point in time, against the developed *plan*. *Actuals* are the real completion of deliverables and the expenditures of budget, schedule, and hours.

These variance measures are used to objectively determine the project’s budget, schedule and scope status so that proactive measures can be taken in advance to correct a potential problem.

## Key Project Indicators

The DIT Leadership Team has identified three key indicators to evaluate project health. The indicators are **Milestone**, **Budget**, and **Scope**.

Key indicator scores of **green**, **yellow** and **red** represent levels of project health.

The **green** indicator score represents a healthy project. If one of the key indicators is temporarily yellow, the project may retain the **green** indicator score.

A **yellow** indicator score represents a project experiencing problems with one or more key indicators. When a project has one or more yellow key indicators (note the exception above), the Project Manager is responsible for defining and monitoring a plan to bring the project back to green status. The DIT Leadership Team will work with the Project Manager to understand the factors influencing the project and take responsibility for action items escalated to them.

A **red** indicator score represents a project experiencing major difficulties with one or more of the key indicators. When a project has one or more red indicators, the Project Manager, with the assistance of the Business Sponsor and the DIT Leadership Owner, is responsible for defining and monitoring an immediate action plan to bring the project back to green status. The DIT Leadership Team will work with the Project Manager and Business Sponsor to understand the factors influencing the project and take responsibility for action items escalated to them.

## Completing the Milestone Information

The **Milestone** key indicator is a high-level measure of project progress. The milestone indicator assesses whether the key phase and deliverable dates projected for completion of major identified deliverables are being met.

A major project milestone is a significant event in the project. A major project milestone usually represents the completion of a major phase or sub-project deliverable. These milestones are major project events that the customer, or business area, can easily recognize. Milestones are used to measure progress and are used as management checkpoints.

While milestones are unique to each project, some common IT project milestones are shown below:

- Requirements approval
- Phase review approval
- Prototype approval
- Design reviews completion
- Code reviews completion
- Unit test completion
- Integration test completion
- Acceptance test completion
- System acceptance by customer
- Documentation delivery
- Warranty completion

The **Status** field for each major project milestone should be reported as “Not Completed” or “Completed”.

To calculate the project milestone score:

$$\text{Milestone Variance} = \frac{\text{Number of Late Milestones}}{\text{Total Number of Milestones}}$$

A “late” milestone is defined as having a Status of “Not Completed” where the Planned Completion Date is prior to the Report Date.

Determine the Milestone Score based on the Milestone Score table below.

Milestone Score	Determination Criteria
Green	Milestone Variance Less than 10%
Yellow	Milestone Variance Greater than or equal to 10% and less than 30%
Red	Milestone Variance Greater than or equal to 30%

**Example:**

Major Project Milestone	Planned Completion Date	Status
Requirements Complete	4/15/02	Completed
Functional Design Complete	5/30/02	Completed
Technical Design Complete	6/30/02	Completed
Construction Phase I Complete	8/15/02	Completed
Construction Phase II Complete	9/10/02	Completed
<b>Construction Phase III Complete</b>	<b>10/15/02</b>	<b>Not Completed</b>
Testing Complete	11/30/02	Not Completed
Customer Acceptance	12/15/02	Not Completed
Implementation Complete	12/31/02	Not Completed

Data:

1. Report Date: 10/31/2002
2. There are nine (9) Major Project Milestones identified for this project.
3. There is one (1) Major Project Milestone that is late (bolded above), based on the report date.

$1 / 9 = .111 \rightarrow$  which translates to 11.1% Milestone Variance

Based on the table above, the Milestone Score is Yellow.

If the **Milestone Score** is yellow, include a brief, yet concise explanation in the **Milestone Score Comments** field. If the **Milestone Score** is red, include a detailed explanation in the **Milestone Score Comments** field, including the strategy to bring the project back on track.

## Completing the Budget Information

The **Budget** key indicator assesses the ability to estimate and control project costs. The **Budget** indicator measures the *actual* cost expended to the *planned* cost expended. This is a determination of whether the project is on track to meet its target budget for implementation.

The **Actual Project-To-Date Cost** is the total expenditures for the project, which have occurred through the end of the reporting period.

The **Total Remaining Project Cost** is a projection of estimated dollars to complete the project, based on the approved scope.

To calculate the project budget score:

$$\text{Budget Variance} = \frac{\text{Total Project Cost}}{\text{Actual Project To Date Cost} + \text{Total Remaining Project Cost}} - 1$$

Then determine the Budget Score based on the Budget Score table below.

Budget Score	Determination Criteria
Green	Budget Variance Less than $\pm 10\%$ .
Yellow	Budget Variance Between $\pm 10\%$ and $30\%$
Red	Budget Variance Greater than or equal to $\pm 30\%$

### Example:

Total Project Cost = \$1,500,000

Actual Project To Date Cost = \$900,000

Total Remaining Project Cost = \$500,000

$\$1,500,000 / (\$900,000 + \$500,000) - 1 = .071 \rightarrow$  which translates to 7.1% positive Budget Variance

Based on the table below, the Budget Score is Green

Keep in mind that Total Project Cost is the approved project budget amount, including project change requests that have been approved and documented.

If the **Budget Score** is yellow, include a brief, yet concise explanation in the **Budget Score Comments** field. If the **Budget Score** is red, include a detailed explanation in the **Budget Score Comments** field, including the strategy to bring the project back on track.

## Completing the Scope Information

The **Scope** key indicator assesses whether the project scope has remained stable. Scope management is concerned with whether or not new requirements have been identified that will impact the completion date, cost, or other success criteria. Scope change management is concerned with whether or not these changes have been formally approved.

Changes in project scope need to be managed through a well-defined change management process. Change management is concerned with identification and management of possible changes to the project, both project and product related. All changes to the scope of the project should be approved, prior to work effort being expended on new or altered specifications. All approved changes should be reflected in the project plan.

The project plan includes the project concept, project charter, project scope statement, project schedule (including milestones), risk management plan, communications plan, procurement plan, quality plan, and other pertinent documents used in planning the project.

At key points in the project timeline, all project plan items are baselined. Baselineing can be defined as the original planned amounts, plus or minus approved changes. Once they are baselined, changes to the baseline are managed through a formal change process.

The Project Scope Score is determined from the Scope Score table below.

Scope Score	Determination Criteria
<b>Green</b>	The project scope has not changed this period, <b>or</b> a project scope change has minimal impact on cost or schedule.
<b>Yellow</b>	The project scope has changed* this period where the change impacts the cost or schedule baselines less than 10% <b>and</b> the project scope change has not been approved.
<b>Red</b>	The project scope has changed* this period <b>and</b> the change impacts the cost or schedule baselines greater than or equal to 10% <b>and</b> the project scope change has not been approved.

\* The phrase “project scope has changed” implies that resources (people, hardware, software, facilities, etc.) have been expended on the change in scope.

If the **Scope Score** is yellow, include a brief, yet concise explanation in the **Scope Score Comments** field. If the **Scope Score** is red, include a detailed explanation in the **Scope Score Comments** field, including the strategy to bring the project back on track.

## Determining the Overall Project Score

The overall project score is determined as follows:

<b>Overall Project Score</b>	<b>Determination Criteria</b>
<b>Green</b>	All three key indicators are green, <b>or</b>  One key indicator is temporarily yellow (one or two periods)
<b>Yellow</b>	One or more key indicators are yellow (note exception above), <b>or</b>  No report received this month for this project, <b>or</b>  A project plan to evaluate project progress is not available, and the target date for establishing such a plan is less than 30 days out
<b>Red</b>	One or more of the three key indicators are red, <b>or</b>  A project plan to evaluate project progress is not available, and the target date for establishing such a plan is greater than 30 days out

If the **Overall Project Score** is yellow, include a brief, yet concise explanation in the **Overall Project Score Comments** field. If the **Overall Project Score** is red, include a detailed explanation in the **Overall Project Score Comments** field, including the strategy to bring the project back on track (or a reference to that explanation if already given).

### **Rolling Historical Score**

The twelve entries in the **Overall Project Score** represent the project health over the last twelve (12) months. Insert the current month's date (mm/yy) and overall project score in the next available cell, starting from the leftmost cell.

### **Other Project Related Comments**

Any other comments relating to this project that should be documented for the purposes of the Dashboard.

### **Saving and Passing the Document to the Business Sponsor and DIT Leadership Owner**

Once the Enterprise Top IT Project Status report is completed, the Project Manager will need to save it. When the "save" or "Save As" window appears, the default file name will appear as "ProjectX Status for MonthYY.doc" (in MS Word).

Change "ProjectX" to the common short name for the project, such as "CEPAS".  
Change "MonthYY" to the month/year of the reporting month, such as "January03".  
Resulting in a the file name "CEPAS Status for January03.doc"

The Project Manager shall then email (and optionally deliver hard copy) to the Business Sponsor and DIT Leadership Owner. The Project Manager will then schedule a meeting with the Business Sponsor and DIT Leadership Owner to discuss the status of the project.

## Management's Role in Interpreting Project Scorecard Information

The Project Manager, Business Sponsor, DIT Leadership Owner and the DIT Leadership Team will compare the current month's Overall Score to the Historical Scores from prior months. Based upon this analysis, one may decide to take certain corrective action(s). The Matrix below illustrates a sampling of possible corrective actions that could be taken to bring the project to successful completion.

<b>Current Month Overall Score</b>	<b>G</b>			<b>Y</b>			<b>R</b>		
<b>Historical Project Score</b>	<b>G</b>	<b>Y</b>	<b>R</b>	<b>G</b>	<b>Y</b>	<b>R</b>	<b>G</b>	<b>Y</b>	<b>R</b>
Business As Usual	X								
Be More Alert To Potential Project Problems		X	X	X	X	X	X	X	X
Attend and Participate in Project Status Meetings			X	X	X	X	X	X	X
Attend and Participate in Business (Project) Sponsor Meetings			X	X	X	X	X	X	X
Conduct Executive Management Reviews			X	X	X	X	X	X	X
Increase Project Team Communications				X	X	X	X	X	X
Determine Root Cause(s) of Identified Problems/Perceived Problems				X	X	X	X	X	X
Become More Involved in Project Decisions				X	X	X	X	X	X
Become Highly Visible					X	X	X	X	X
Offer Additional Project Resources (Time, Money, Staff or Oversight) or ensure proper resources are provided					X	X	X	X	X
Become Involved in Re-planning to an Achievable Timeframe					X	X	X	X	X
Make Future Project Funding Dependent on Corrective Actions						X	X	X	X
Discuss Alternatives to meet Business Needs							X	X	X
Consider the purchase of additional equipment/facilities								X	X
Discuss/Consider Modifying the Scope of the Project						X		X	X
Consider Hiring Trained Specialists to get the Project back on track								X	X
Consider the Design of an Alternate (Contingent) Solution Strategy									X
Consider Replacing Project Staff Resources/Project Manager									X
Investigate/Entertain Replacing the Contractor if Performance and Delivery Unsatisfactory									X
Discuss/Consider Canceling the Project Funding									X

## **Project Dashboard Audit Process**

The Dashboard is one of the tools that DIT utilizes for communication, resource planning, risk mitigation and decision-making. The Strategic Project Office will periodically review project documents through a periodic Dashboard Status Walk-thru to ensure that DIT has accurate information to support this decision-making process.

The objective of the walk-thru is to provide an independent review of project documentation.

The information evaluation criteria are:

- Availability of Documentation
- Reliability of Information

Strategic Project Office will work with the Project Manager, Business Sponsor and/or DIT Leadership Owner on this effort and will document the outcomes of the review along with any recommended actions. This will be a joint effort and responsibility between the Strategic Project Office, the Project Manager, Business Sponsor and the DIT Leadership Owner.

## Key Terms and Acronyms

The following is a list of common terms and acronyms that may be applicable for the dashboard reporting process. While many of these terms are not mentioned within the body of this user guide, they are nonetheless important to understanding Project Management and may be applicable to the Dashboard Reporting Process.

If you need further information on any of the following definitions, please consult the State of Michigan Project Management Methodology and the variety of sources listed in the Resources and Reference list within the Appendix of the Project Management Methodology.

**Action Plan** – A plan that describes what needs to be done and when it needs to be completed. Project plans are action plans.

**Actual Cost** – Total costs incurred (direct and indirect) in accomplishing work during a given time period.

**Analysis** – The study and examination of something complex and the separation into its more simple components. Analysis typically includes discovering not only what are the parts of the item being studied, but also how they fit together. An example is the study of schedule variances for cause, impact, corrective action, and results.

**Approve** – To accept as satisfactory. Approval implies that the item approved has the endorsement of the approving entity. The approval may still require confirmation by somebody else, as in levels of approval. In management use, the important distinction is between approve and authorize. See Authorization.

**Areas of Responsibility** – Used to define the person or organizational entity responsible for specific policy areas, processes, and procedures as identified. The current levels of responsibility are Legislature, Department of Information Technology, state agency, DIT leadership owner, Business Sponsor, Project Manager, and customer.

**Audit** – An independent review of project records to determine the accuracy.

**Authorization** – The power granted by management to specified individuals allowing them to approve transactions, procedures, or total systems. Defined as the final organization authority.

**Authorized Work** – An effort that has been approved by higher authority and may or may not be defined.

**Baseline** – The original plan (for a project, a work package, or an activity) plus or minus approved changes. Usually used with a modifier (e.g., cost baseline, schedule baseline performance measurement baseline).

**Budget** – When unqualified, refers to an estimate of funds planned to cover a project or specified period of future time.

**Budget At Completion (BAC)** – The planned total cost of the project when done.

**Business (Project) Sponsor** -- A person who provides funding for the project.

**Champion** – A person who takes on personal responsibility for the successful completion of a project.

**Change Control** – The process of controlling, documenting, and storing the changes to control items. This includes proposing the change, evaluating, approving or rejecting, scheduling and tracking.

**Change in Scope** – A change in objectives, work plan, or schedule resulting in a material difference from the terms of previously granted approval to proceed.

**Change Management Process** – A set of tasks or procedures established to ensure that project performance is measured to the baseline and changes are reviewed, approved or rejected, and the baseline is updated.

**Contingency Planning** – The development of a management plan that identifies alternative strategies to be used to ensure project success if specified risk events occur.

**Control** – The process of comparing actual performance with planned performance, analyzing variances, evaluating possible alternatives, and taking appropriate corrective action as needed.

**Control System** – A mechanism that reacts to the current project status in order to ensure accomplishment of project objectives.

**Corrective Action** – Changes made to bring expected future performance of the project into line with the plan.

**Cost Control** – Controlling changes to the project budget.

**Cost Estimating** – Estimating the cost of the resources needed to complete project activities.

**Cost Performance Index (CPI)** – The ratio of budgeted costs to actual costs (Budgeted Cost of Work Performed / Actual Cost of Work Performed). CPI is often used to predict the magnitude of a possible cost overrun using the following formula:  $\text{original cost estimate} / \text{CPI} = \text{projected cost at completion}$ .

**Cost/Schedule Impact Analysis (CSIA)** – The process followed to determine the cost and/or schedule impact of a specific change with a project.

**Cost Variance (CV)** – Any difference between the estimated cost of an activity and the actual cost of that activity.

**Deliverable** – Any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project or part of a project. Often used more narrowly in reference to an *external deliverable*, which is a deliverable that is subject to approval by the business (project) sponsor or customer.

**Duration** – The number of work periods (not including holidays or other non-working periods) required to complete an activity or other project element. Usually expressed as workdays or workweeks. Sometimes incorrectly equated with elapsed time.

**Earned Value** – A method for measuring project performance. It compares the amount of work that was planned with what was actually accomplished to determine if cost and schedule performance is as planned.

**Effort** – The number of labor units required completing an activity or other project element. Usually expressed as staff hours, staff days, or staff weeks. Should not be confused with *duration*.

**Estimate** – An assessment of the likely quantitative result. Usually applied to project costs and durations and should always include some indication of accuracy (e.g., +/- x percent). Usually used with a modifier (e.g., preliminary, conceptual, feasibility). Some application areas have specific modifiers that imply particular accuracy ranges (e.g., order-of-magnitude estimate, budget estimate, and definitive estimate in engineering and construction projects).

**Estimate At Completion (EAC)** – The expected total cost of an activity, a group of activities, or of the project when the defined scope of work has been completed. Most techniques for forecasting EAC include some adjustment of the original cost estimate based on project performance to date. Often shown as  $EAC = \text{Actuals-to-date} + \text{Estimate To Complete}$ .

**Estimate To Complete (ETC)** – The expected additional cost needed to complete an activity, a group of activities, or the project. Most techniques for forecasting ETC include some adjustment to the original estimate based on project performance to date. Also called "estimated to complete."

**Exception Reporting** – The process of documenting those situations where there are significant deviations from the specifications of a project. The assumption is made that the project will be developed within established boundaries. When the process falls outside of those boundaries, a report is made on why this deviation occurred.

**Implementation** – Occurs when products have completed testing are moved into production or into their working environment. Normally used as a term on Information Technology projects.

**Independent Project Oversight** – A process that employs a variety of quality control, inspection, testing measurement, and other observation processes to ensure that planned project objectives are achieved in accordance with an approved plan. Project oversight is usually done by an independent entity (separate from the project team) trained or experienced in a variety of management and technical review methods. Project oversight includes both technical and management oversight.

**Initial Risk Identification** – The process during the initial concept phase of identifying risks that might impact a project. The risk identification process is recommended for agencies to evaluate a project.

**Management Project Oversight** – The process of evaluating and monitoring the project management processes that exist for a given project and ensuring that the stated process conforms to the project plan.

**Methodology** – Used to define the processes, policies, and guidelines that are included as part of the framework for project management.

**Milestone** – A significant event in the project usually completion of a major deliverable.

**Mitigation** – Taking steps to lessen risk by lowering the probability of a risk event's occurrence or reducing its effect should it occur.

**Monitoring** – The capture, analysis, and reporting of project performance, usually as compared to plan.

**Percent Complete** – An estimate, expressed as a percent, of the amount of work, which has been completed, on an activity or group of activities.

**Performance Reporting** – Collecting and disseminating information about project performance to help ensure project progress.

**Performing Organization** – The enterprise whose employees are most directly involved in doing the work of the project.

**Planned Completion Date** – The current estimate of the point in time when an activity will be completed.

**Planned Value** – The sum of the approved cost estimates including any overhead allocation) for activities (or portions of activities) scheduled to be performed during a given period (usually project-to-date).

**Product** – General terms used to define the end result of a project delivered to a customer.

**Product Description Statement** – A non-formal, high level document that describes the characteristics of the product/process to be created.

**Program** – A group of related projects managed in a coordinated way. Programs usually include an element of ongoing activity.

**Progress Analysis** – The evaluation of progress against the approved schedule and the determination of its impact. For cost, this is the development of performance indices.

**Project** – A temporary endeavor undertaken to create a unique product or service.

**Project Administration** – Entails making Project Plan modifications that may result from such things as: new estimates of work still to be done, changes in scope/functionality of end-product(s), resource changes and unforeseen circumstances. It also involves monitoring the various Execution Phase activities, monitoring risks, status reporting, and reviewing/authorizing project changes as needed.

**Project Charter** – A document issued by senior management that provides the Project Manager with the authority to apply organizational resources to project activities.

**Project Control** – A project management function that involves comparing actual performance with planned performance, and taking corrective action to yield the desired outcome, when significant differences exist.

**Project Cost Management** – A subset of project management that includes the processes required to ensure that the project is completed within the approved budget. It consists of *resource planning*, *cost estimating*, *cost budgeting*, and *cost control*.

**Project Duration** – The elapsed time from project start date through to project finish date.

**Project Management** – The application of knowledge, skills, tools, and techniques to project activities in order to meet project requirements.

**Project Manager** – The individual appointed and given responsibility for management of the project.

**Project Oversight** – A process that employs a variety of quality control, inspection, testing measurement, and other observation processes to ensure that planned project objectives are achieved in accordance with an approved plan. Project oversight is usually done by an independent entity (separate from the project team) trained or experienced in a variety of management and technical review methods. Project oversight includes both technical and management oversight. (Same as Independent Project Oversight).

**Project Plan** – A formal, approved document used to guide both project execution and project control. The primary uses of the Project Plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document approved scope, cost, and schedule baselines.

**Project Risk Management** – A subset of project management that includes the processes concerned with identifying, analyzing, and responding to project risk. It consists of *risk identification*, *risk quantification*, *risk response development*, and *risk response control*.

**Project Schedule** – The planned dates for performing activities and the planned dates for meeting milestones.

**Project Scope Management** – A subset of project management that includes the processes required to ensure that the project includes all of the work required, and only the work required, to complete the project successfully. It consists of *initiation*, *scope planning*, *scope definition*, *scope verification*, and *scope change control*.

**Project (Business) Sponsor** -- A person who provides funding for the project.

**Project Start Date** – The current estimate of the point in time when an activity will begin.

**Resource** – Something that lies ready for use or that can be drawn upon for aid or to take care of a need. These resources could be additional time, money, or staff.

**Risk** – An uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives.

**Risk Assessment** – Review, examination, and judgment of whether or not the identified risks are acceptable. Initial risk assessment is used as a tool to determine project oversight requirements.

**Risk Event** – A discrete occurrence that may affect the project for better or worse.

**Risk Identification** – Determining which risk events are likely to affect the project.

**Risk Management** – The art and science of identifying, analyzing, and responding to risk factors throughout the life of a project and in the best interests of its objectives.

**Risk Mitigation** – The act of revising the project's scope, budget, schedule, or quality in order to reduce uncertainty on the project.

**Schedule** – The planned dates for performing activities and for meeting deliverables.

**Schedule Performance Index (SPI)** – The ratio of work performed to work scheduled.

**Schedule Variance (SV)** – Any difference between the scheduled completion of an activity and the actual completion of that activity.

**Scope** – The sum of the products and services to be provided as a project.

**Scope Change** – Any change to the project scope. A scope change almost always requires an adjustment to the project cost or schedule.

**Scope Creep** – The gradual addition of new requirements to the original product specifications.

**Scope Statement** – A document capturing the sum of products and services to be provided as a project. The Scope Statement is part of the Project Plan.

**Scope Verification** – Ensuring that all identified project deliverables have been completed satisfactorily.

**Slippage** – The tendency of a project to exceed original estimates of budget and time.

**Stakeholder** – Individuals and organizations that are involved in or may be affected by project activities.

**Status Reports** – A report containing information on a specific project, indicating if the project is ahead of schedule, on schedule, or behind schedule in relation to the project plan.

**Team Member** – The individuals, reporting either part time or full time to the Project Manager, responsible for some aspect of the project's activities.

## Bibliography

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Commonwealth Major IT Project Status Report Dashboard User Manual Version 1.0	Commonwealth of Virginia	User Manual for Commonwealth of Virginia Major IT Project Status Reporting Dashboard on-line web reporting process
Guide to the Project Management Body of Knowledge (PMBOK®)	Project Management Institute Standards Committee	Used to provide a consistent structure for PMI® professional development programs, including PMP certification.